MANAGER ROLE

Note: screen displays may differ slightly from the ones shown in this tutorial.

Although the 2015 appraisals are displayed for this tutorial, you will complete the instructions for the current year appraisal period.
COMPLETING THE ANNUAL PERFORMANCE APPRAISAL IN TAENT MANAGEMENT—MANAGER ROLE

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STEP ONE: Opening the appraisal.

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A quick overview. Stacked tasks are opened only after the previous task is complete.

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Review the employee’s self-evaluation if one was completed. After reviewing the self-evaluation inputs, click Save and Continue to enter your ratings for this employee.

**Note:** If you wish to designate a co-planner for the appraisal, email HRtraining@shsu.edu, subject “Please add Co-planner.” Co-planners can perform reviews as though they were the manager who was assigned the task. This can be useful for managers to delegate appraisals for certain review tasks.

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Step Two: Complete Appraisal Factors.

Complete all required rating factors and any comments. Items designated with a red asterisk are required.

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COMPLETING THE ANNUAL PERFORMANCE APPRAISAL IN TALENT MANAGEMENT—MANAGER ROLE

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Step Three: Add developmental goals for the year.

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Review summary rating and click Submit, or click Back to go back and make revisions. **Note:** The overall rating will only display after you return to conduct and acknowledge the review meeting. This is to prevent the reviewee from seeing the rating prior to the review meeting.

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You may print the appraisal to prepare for the review meeting by clicking the Options down arrow.

**CONDUCT THE REVIEW MEETING AT THIS POINT. THEN RETURN TO THE APPRAISAL (SEE NEXT STEP).**

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Step Four. Conduct and acknowledge the Review Meeting.

**Note:** Conduct the review meeting with the employee. Then, to acknowledge the review meeting, return to the appraisal by clicking on **Home>Scheduled tasks**.

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Select the appraisal from the list.

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Tip: Click on Summary on the sidebar to quickly move to the summary screen.

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Note: Read the instructions on this page carefully. Be sure you are done prior to clicking Submit. Once this is selected, only an HR system administrator can reopen the appraisal. Click Back to review or change an input prior to submitting. Click Save and Exit to save without submitting.

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COMPLETING THE ANNUAL PERFORMANCE APPRAISAL IN TALENT MANAGEMENT—MANAGER ROLE

Note: The employee will be able to see the entire appraisal once you click Submit. This will trigger an email that will notify the employee to acknowledge receipt of the appraisal in Talent Management. The appraisal is not complete until the employee acknowledges the receipt.

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Return to Home>Scheduled Tasks to complete any other employee appraisals assigned to you.

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You can always see the progress of all appraisals here. Due dates may vary depending on the step you are in for the appraisal and the date of completion of the previous step for the appraisal.

Once an employee acknowledges an appraisal, it will go from being an In Progress task to a Completed task. Click “Show completed and expired tasks” to view all completed appraisals. To re-enter the completed appraisal for viewing or printing, click on the title of the appraisal.

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Once the employee has acknowledged receipt, the Employee Acknowledgment step circle will show as solid inside the appraisal. You may print a copy of the appraisal for your records by clicking on Options in the upper right corner, but Talent Management will retain a permanent copy of all appraisals.

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